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ABSTRACT

This paper is designed to identify effective methods and to lay out steps that can be used in a customer feedback survey process. In order for the results of any customer survey to stimulate useful changes in an organization, it is essential that the support of key players be present from the beginning. Developing a customer feedback process is a multilevel process that begins with defining the services provided and the priorities the organization and its customers assign to each service. Identifying the primary objective of the survey process and assuring that the information will be used are key steps. Some suggestions are given for conducting broad surveys, specific activity surveys, spot surveys, and process analysis. At each of these survey levels, there are areas that can be assessed, including people, processes, information, and outcomes. Some specific survey techniques are outlined, and sampling issues are discussed. Attachment A discusses method to identify and prioritize services, and Attachment B contains an example of a survey used in a campus study. (SLD)

Customer Feedback A Framework for Action

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Customer Feedback

A Framework for Action

Introduction

This paper is designed to identify effective methods and lay out steps that can be used in a customer feedback survey process. The procedures are generalizable to any survey process. The processes and methods come from four primary sources: (1) experience, (2) common sense, (3) survey research literature, and (4) examples from others' survey efforts. For those of you who wish documentation of the survey literature behind these methods, we recommend beginning with Linda Suskie's excellent little tome: *Questionnaire Survey Research: What Works*.

Musts

In order for the results of any customer survey efforts to stimulate useful changes in an organization, one requirement is absolutely necessary. Without this, the effort expended in the survey process will almost surely be wasted.

Key players support must be present.

Key players may be a director, or the individuals providing a service, or a president. Their support must be enlisted early in the survey process and they should be kept aware of the survey process and its progress, and not merely presented with final reports and recommendations.

Methods

The effective use of customer feedback requires a multilevel process.

The development of a customer feedback process begins with the following questions:

- 1 - What services do we provide, to whom and why?
- 2 - What priority do we assign to each service and what priorities do our various customers assign to each service?
- 3 - What are we NOT DOING that we should be doing?

See Attachment A for a possible method to approach this.

Further Considerations When Creating Surveys

Answering the following two KEY questions helps reduce questionnaire length and assure useful survey data:

- 1 - What is the ONE PRIMARY OBJECTIVE of this survey process?
- 2 - How can we assure that the resultant information will be USED???

These should be the first questions asked during any survey effort. When developing surveys one should decide whom to survey and tentatively determine how to use the results (set preliminary criteria for decisions) before administering any surveys.

Developing a Matrix for Analysis

Several types of surveys (termed LEVELS) are defined below; each of which can be directed at several different factors (termed AREAS) which are inherent to almost all kinds of service delivery. From these LEVELS and AREAS, a matrix is developed which allows one to focus customer feedback efforts within a "total" context.

LEVELS of Information

Several LEVELS of survey activity may be used to obtain information from customers. Each of the four levels outlined below has different advantages and disadvantages.

1 - Broad Surveys - Purpose: To compare groups (develop norms). Method: The same set of survey questions is administered to a wide range of customers and the results are used to evaluate several groups (e.g. department, offices, etc.). Comments: By using the same set of questions across groups of operations/departments/sections/etc., one can determine which areas appear to need the most attention¹. This appears to be the most popular method currently in use around the nation.

2 - Specific Activity Surveys - Purpose: To identify what is working well and what is not working well from a customer perspective, within a given process. Method: Administer short surveys, either on-site or mail-out, which assess specific activities in a process. Comment: A compliment to internal Process Analysis (#4).

3 - Spot Surveys - Purpose: To determine the customer wants and needs that an office is not providing, or, to evaluate any other specific question. Method: Administer short (card) surveys to a sample of customers at predetermined sampling intervals on-site. Comment: Useful for identifying both critical problems and additional services that are needed/desired.

4 - Process Analysis - Purpose: To identify log jams within current procedures. Method: Identify required actions, determine critical points where processes slow down or fail, identify a method to reduce failures and slow-downs. Comment: This method becomes far more effective when used in conjunction with #2 (Specific Activity Surveys) than when limited to a strictly internal analysis, because customers' priorities come first in a customer-centered model, and research has shown that customers often have different priorities than either staff or administrators.

AREAS to Assess

At each of those levels, there are several AREAS that can be assessed (See Attachment B, a survey developed for USF's Sarasota Campus, which may be used as a model for the following):

1 - People - How are **our** people responding to customers? Personnel should be available, courteous, professional, and knowledgeable. Customers could rate each office or department on these four topics using a four-point scale: very, moderately, somewhat, and not very. Their responses would provide guidance for action. If availability is lacking, then either more staff or

¹ However, merely because one section scores "lower" than another, or all others, does not necessarily indicate that it is less "productive". In any organization, a lack of productivity may result from external constraints as readily as from internal process or personnel problems.

better training is needed. If courteousness or professionalism is lacking, then training or staff replacement may be appropriate. If knowledge is perceived as inadequate, then a more detailed questionnaire addressing different areas of staff activities can be used to pinpoint the problem.

2 - Processes - Are processes efficient, clearly delineated, timely and productive?

3 - Information (a specific and common Outcome for us, therefore treated as a separate AREA) - Are customers receiving what they need (the appropriate information) when they need it? Is the information prompt, accurate and complete, without being overwhelming?

4 - Outcomes - Are our customers receiving what they want, when they want it?

Because a customer's responses in one area might bias their responses in other areas, each person should probably be asked questions about only one, or at the most two different areas. For example, if a customer is met by a very negative and brusque, yet extremely competent employee, the negative affect created by the employee's personality could negatively bias the customer's responses regarding any of the other areas (Process, Information, or Other Outcomes), if that customer responds to items in all four areas, all four might be negative, which could make it difficult to determine that in fact it is PEOPLE (courteousness) that requires attention. A benefit of limiting the AREAS about which each person surveyed must respond is a reduction in survey length for each respondent. A cost of such a limit is the need to survey more individuals to obtain a reasonable number of responses for each area.

Looking at the Customer Survey process from the outlook provided by this matrix of LEVELS and AREAS, it becomes possible to focus efforts to obtain specific types of information.

AREAS	LEVELS			
	Broad Surveys (Normative)	Specific Activity Surveys	Spot Surveys	Process Analysis
People				
Processes				
Information				
Outcomes				

Some Useful Survey Techniques

Overall Evaluation of services can be useful:

- How likely would you be to use our services in the future? (If you had a choice)
- Overall Evaluation on a scale (Your visit to our office was: satisfactory...unsatisfactory)

Eliciting Comments (Useful for Spot Surveys)

Rather than merely asking "Any Comments", well designed comment prompts such as the following can considerably enhance the usefulness of the comments:

- In what area(s) do we most need to improve?
- What do you need (and want) the most from my organization? (Or, What would you most like to see that we aren't doing now?)
 - Why are these (is this) important to you?
 - How will you know when we really meet your needs? (What would it look like? How could you tell?)

A few (at most 3 or 4) specific yes/no or multi-point questions, with room for comments about a specific service can provide further information. These questions should be "leading" and might be answered using cards & cheap pencils, while customers are standing in line.

Demographics

- In general, unless there is reason to believe that demographic characteristics (e.g., sex, age, ethnicity, etc.) relate to differences in either service needs or service provisions, **demographic items will not prove useful in this process**. One exception is offices that provide different services to different groups (e.g., staff/faculty/students, freshmen/sophomores...graduate students, people from different colleges, etc.).

Keeping the Survey Brief

As a general rule of thumb, surveys should not be longer than 2 pages, with 5-10 minutes time for completion. Anything longer than that induces fatigue, boredom, and finally irritation. Although a lot of information can be collected using a long questionnaire, the quality and validity of the obtained information is jeopardized.

The following criteria can reduce the length of a survey. Even surveys developed by committees can use these criteria if they are agreed upon early in the process.

- If unsure about the usefulness of the information gathered from a question, delete the question.
- If a question's information can be obtained from any other source, delete the question.

One viable method to evaluate how "useful" such surveys actually are is to have each office/organization provide "expected responses" for each item. Frequently we find that survey data merely adds enough support for what "we already know" to enable the shift of resources required to solve a specific problem.

Sampling

For Broad, Normative Surveys (Level 1), the number of customers answering each question should ideally be fairly large (preferably at least 200). For Specific Activity Surveys, the sample can be considerably smaller (perhaps 50-100). When conducting Spot Surveys, small samples of perhaps 3-5 customers should be surveyed at several different times (for example, different times of the day, different days of the week). If 10 spot samples of 5 customers each are taken during a week, this would total 50 responses, which should be enough to provide some useful information. Spot Surveys can also be made available to all customers by having a box of Customer Feedback Cards and a drop

box in an office's lobby. By altering the questions on such cards from week to week, Specific Activity Surveys can be conducted using this method.

The purpose of this document is to provide a framework from within which customer survey efforts can function in an effective and integrated fashion. By assessing the LEVELS and AREAs at which a group is currently working and implementing changes suggested by the findings from surveys, improved customer service will surely occur.

Remember that unless key actors who determine how an organization conducts business are involved from the outset, changes will probably not occur, and even the most important survey results will end up gathering dust on some shelf.

Caveats

The assessment process holds many pitfalls for the unwary: Question wording can have deadly effects on responses; faulty sampling can bias results; inappropriate analyses or conclusions can mislead the most well-intentioned efforts. In the development of a customer feedback process, we must remain aware of each of these pitfalls.

Attachment A

Methods to Identify and Prioritize Services

The major purpose of this activity is to document your primary customers and the services you provide them. Hopefully this will enable a rationale approach to the customer feedback process.

Please list all the types of customer to whom your office provides services. Give an adequate description of the customers so that we may distinguish between different groups. See the attached page for an example. If you require more space to list all of your customers, please make a copy of this form.

Please identify the major customers you serve and assign each customer a unique number. If a service relates to a specific office or group, please list that group as a customer (e.g., if you provide a specific report only to students who are eligible for the CLAST, or produce a report for only the Budget Office, etc.).

Customer Form

Customer #	Customer Description	Customer Type

In the form below, please list all major services you provide, the customers to whom you provide these services (use the customer numbers from the preceding page to identify specific customers, the priority that you usually assign to this service, and the priority your customer usually assigns to this task, using the scale below:

1	High Priority	Immediately goes to the top of your to do list
2	Moderate Priority	Only goes to the top of your to do list if no High Priority items are on that list
3	Low Priority	You will get to it when you have time

When listing services, do not go into detail, unless you provide a substantially different form of a service to different customers. For example, in RAP's IR section, we conduct the BOR mandated statistical salary equity study. That would be one service, although it consists of many different parts, each of which differs somewhat from each other. We provide different information to the Provost's Office, the EEO Office, and each College Dean and Director. We write different computer programs to produce different analyses for

different groups of employees ranging from Ranked Faculty to Administrative and Professional staff. We also provide specific information to individual faculty on request, which differs from other outputs. However, all of these are encompassed in the service we title Salary Equity Statistical Study (the details differ for each customer). Thus, for each customer to whom you provide a service, please attempt to estimate the priority associate with each of your major services for both customers (listed on the Customer Form) and yourself.

Services Form

Customer#	Customer Type	Service	Priority to Us	Priority to Customer

Example

Customer Form

Customer #	Customer Description	Customer Type
1001	Faculty (all)	
1009	Students (all)	
1011	Faculty, College of Fine Arts	

Services Form

Customer#	Customer Type	Service	Priority to Us	Priority to Customer
1001	Faculty	Enroll students in courses during registration	1	2
1009	Students	..	1	1
1011	Faculty	Provide projections of future enrollment in Dance and Music Courses	3	2

Attachment B

Sarasota Campus Survey

Spring 1994

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10

Information Gathered from the Spring 1994 Survey

This survey effort falls into the category of Broad Survey of People, Information and Processes. A copy of each of the three forms used in this study and graphs of the results follow. Each form was administered to a different set of students during class. This made it easy for faculty to comply, because little time was required to answer the forms. Class samples were stratified by major to assure representativeness for each form (business, education, etc.). Ninety two individuals responded to the People form, 91 to the Information form and 91 to the Processes form (an average of 6 different classes for each form).

The charts following each form show the results for that form. The following information resulted from these data:

The admissions and registration processes, with the exception of academic advising, appear to be running quite smoothly. The people in academic advising are courteous and knowledgeable, but not enough advisors are available. In addition, the processes and information get relatively low ratings (about 60% satisfied). Finally, it is especially troubling that only 25% of the students thought that the information from academic advising was 'almost always' accurate. (We should note that this campus does not have a full-time academic advisor).

Food Services had the lowest ratings for people. There are relatively high levels of dissatisfaction: 20% think the staff are 'almost never' knowledgeable and 'almost never' courteous, and 30% think the staff are 'almost never' available.

There appears to be a great need in the computer labs for more staff. In addition, the lab staff must be much more knowledgeable. Some students might be satisfied with more manuals, computer tutorials, etc.

Although students are satisfied with the staff in the Career Resources Center, they are dissatisfied with the information in the Center. About 30% of the students think that the information is 'almost never' accurate, available, or useful.

With the exception of food services and the computer labs, students give high ratings to the staff. In most areas, information could be more available, accurate, and useful. In some areas, the procedures should be made simpler and more efficient. This report has identified both general and specific problem areas. In most areas, identifying the strategies for improving the areas will require additional investigation.

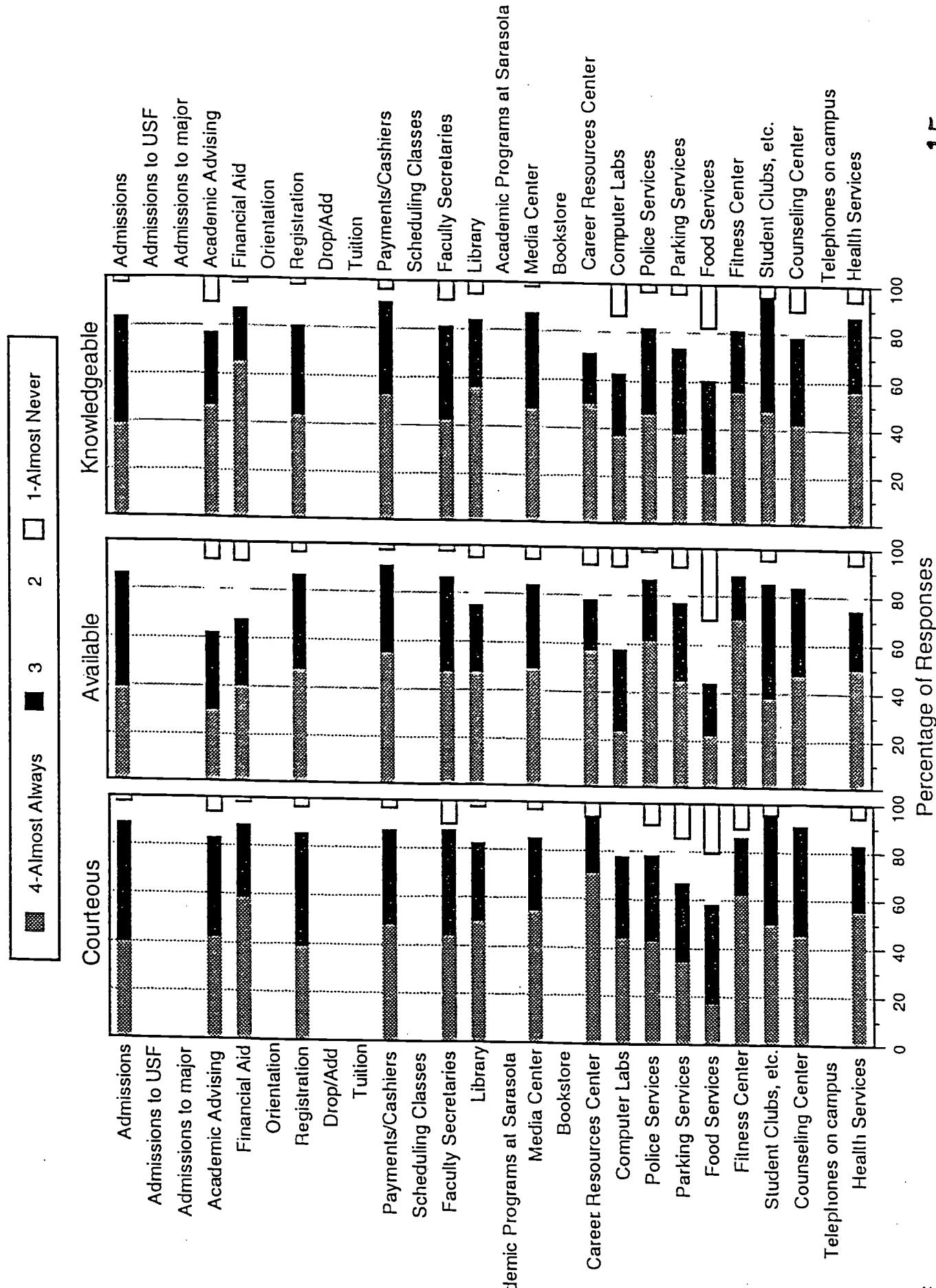
As a student at USF-Sarasota, you come into contact with many PEOPLE (on the Sarasota campus) who work with various programs or services on campus. Please rate below how often the people serving you were Courteous, Available, and Knowledgeable. Circle the number that best represents your experiences, where 4=Almost always (courteous, available, or knowledgeable) and 1=Almost never. Mark the Don't know column if you have no experiences to report.

PEOPLE	courteous	available	knowledgeable	don't know
Admissions	4	3	2	1
Academic Advising (2nd floor of PMD)	4	3	2	1
Financial Aid	4	3	2	1
Registration	4	3	2	1
Cashier	4	3	2	1
Library	4	3	2	1
Secretaries to members of the Faculty	4	3	2	1
Media Center	4	3	2	1
Computing labs staff	4	3	2	1
Police Services	4	3	2	1
Parking Services	4	3	2	1
Food Service	4	3	2	1
Career Resource Center	4	3	2	1
Fitness Center	4	3	2	1
Student Clubs, Organizations and Activities	4	3	2	1
Counseling Center	4	3	2	1
Health Services	4	3	2	1

In what offices have you found the people who have been most helpful to you? Least helpful? Please give examples of how they have been helpful or not helpful.

Other comments. (use other side of page if needed)

Figure 1. Customer Service Survey: Frequencies for People Ratings



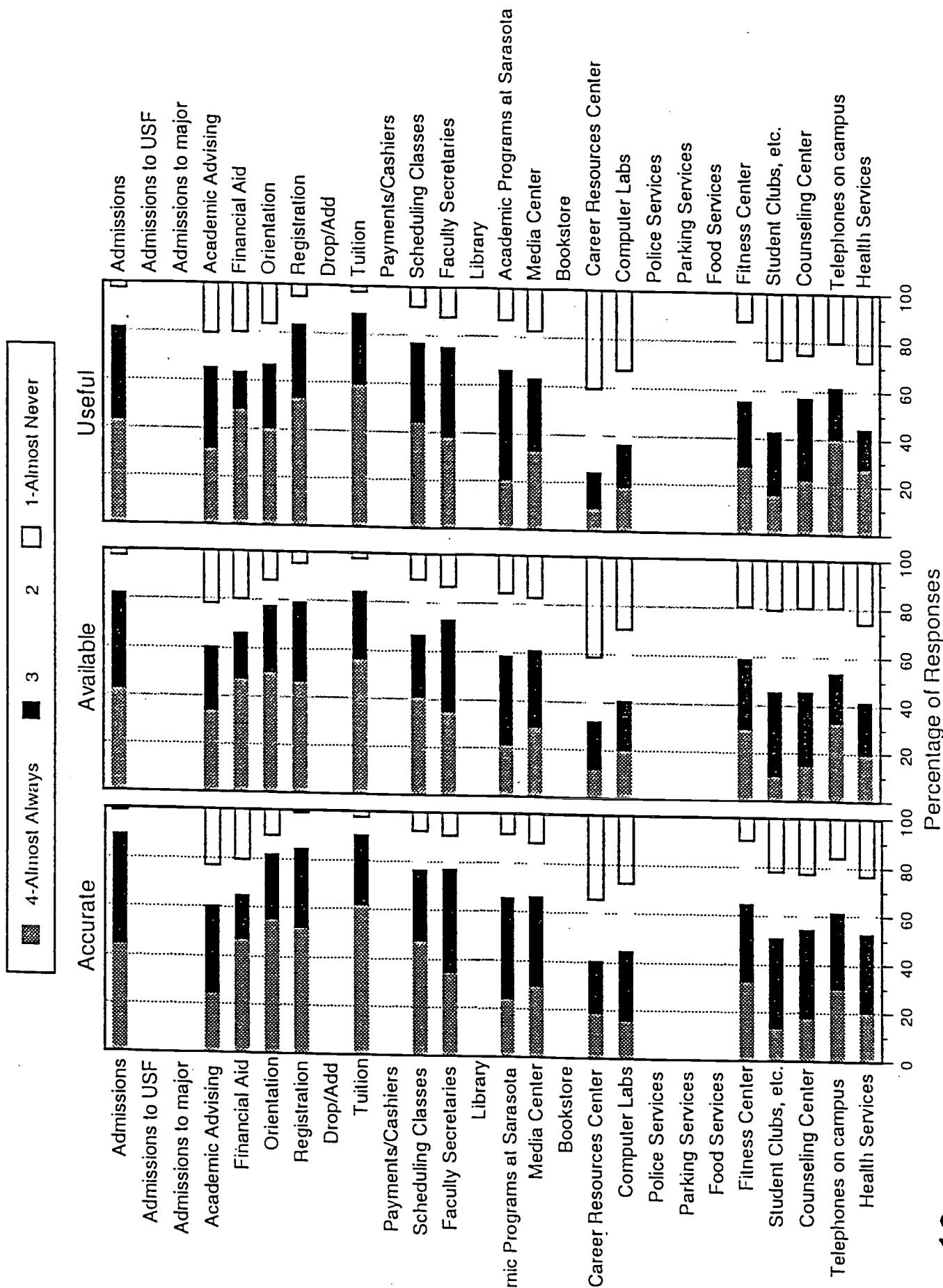
You have probably received much INFORMATION about the University Program and USF-Sarasota. Please rate below the Accuracy, Availability, and Usefulness of information you received. Circle the one number that best represents your experiences, where 4=Almost always (accurate, available, useful) and 1=Almost never. Mark the Don't Know if you have no experiences to report for a specific service.

INFORMATION	accurate	available	useful	don't know
About admission to the University Program	4	3	2	1
About Academic Advising	4	3	2	1
You were given at Orientation	4	3	2	1
About Financial Aid	4	3	2	1
About registration	4	3	2	1
About paying tuition and fees	4	3	2	1
About scheduling your classes	4	3	2	1
About academic programs at Sarasota	4	3	2	1
About using the Library	4	3	2	1
About using the Media Center	4	3	2	1
About using the computer labs	4	3	2	1
About Career Res. Center programs and services	4	3	2	1
About the Fitness Center	4	3	2	1
About participating in Student Clubs, Organizations	4	3	2	1
About Counseling	4	3	2	1
About telephoning offices on the campus	4	3	2	1
About Health Services	4	3	2	1

What has been the most useful information you have received as a University Program student? Least useful?

Other comments. (use other side of page if needed)

Figure 2. Customer Service Survey: Frequencies for Information Ratings



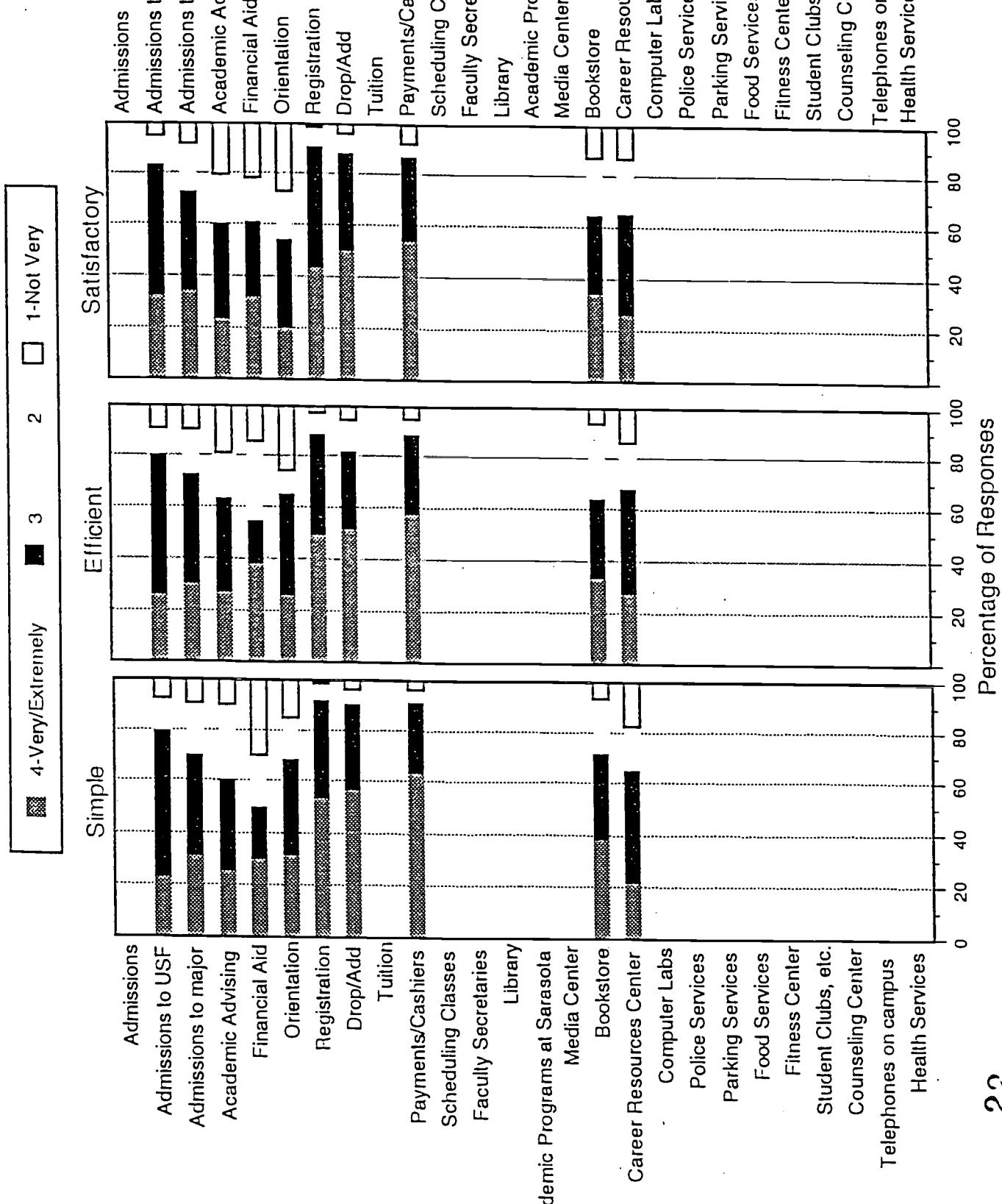
As you attend USF-Sarasota there may have been forms to complete, offices to contact, lines to stand in, and people to consult. There are two PROCESSES of the University. Please rate how simple, efficient, and satisfactory each of the processes noted below was for you. Circle the one number that best represents your experiences, where 4=Very or Extremely (simple, efficient, and frustrating) and 1=Not Very. Mark the Don't know column if you have no experiences to report for a specific service.

PROCESSES	simple	efficient	satisfactory	don't know
Admission to the University	4	3	2	1
Admission to your academic program	4	3	2	1
Academic Advising	4	3	2	1
Orientation	4	3	2	1
Financial Aid	4	3	2	1
Registration	4	3	2	1
Drop and add	4	3	2	1
Cashier and payment	4	3	2	1
Bookstore (purchasing books and other supplies, selling books back)	4	3	2	1
Career Res. Center (setting up appointments, getting on the alert list, placing your resume on file)	4	3	2	1

Please identify your most positive and negative experiences at USF-Sarasota.

Other comments. (use other side of page if needed)

Figure 3. Customer Service Survey: Frequencies for Processes Ratings





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